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ABSTRACT

Supporting performance objective 46 of the V-TECS (Vocational-Technical Education Consortium of States) Secretarial Catalog, both a set of student materials and an instructor's manual on completing invoices are included in this packet. (The packet is the fifth in a set of nine on performing computational clerical activities--CE 016 951-959.) The student materials include basic information on sales invoices, a student activity involving computations and completion of an invoice, and a check-out activity with sample invoice forms. The instructor's manual includes instructions for duplicating materials necessary for the activities and answer keys for both activities. The materials are designed for self-paced individual instruction and may be adapted for use with large groups. (A separate booklet--CE 016 911--lists contents for the nine packets in this set along with those in several other sets--seventy-eight packets in all--based on the same V-TECS catalog.) (JT)

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COMPLETING INVOICES

STUDENT'S MANUAL

Prepared by

Jean Hamer

These materials support
Performance Objective 46 of the
V-TECS Secretarial Catalog

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION

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CE 016 955

COMPLETING INVOICES

INTRODUCTION

Invoices, sometimes called sales invoices, are prepared by the vendor (seller) in triplicate. An invoice shows the date the goods are shipped, order number, shipping information, terms, quantity, description, and unit price. One copy of the invoice is mailed to the buyer, one is sent to the shipping department, and one is retained by the vendor for the files.

DIRECTIONS

If you need practice in computing extensions, complete Student Activity I

or,

If you are ready to complete the problems, turn to Check Out Activity I, prepare and total the invoice using the information given on page 4.

OBJECTIVES

Given three blank invoices, complete the invoices in correct format. All calculations must be completed with 100% accuracy to be acceptable.

STUDENT ACTIVITY I

INVOICE 65

SWANN'S ATHLETIC CO.

COLUMBIA, SC 29201

Telephone (803) 573-8085

Sold To

McColl Hardware
East Main Street
Clio, SC 29525

Date 5/20/7-

Our Order No. 968

Cust. Order No. 16

Terms N/30

Shipped Via Freight

Quantity	Description	Unit Price	Total
6	Baseball bats, No. 34	3.50	21.00
3	Baseball mitts, No. 589	6.50	19.50
1 doz.	Baseballs, No. 124	48.00	48.00
			88.50
	Add 4% SC Sales Tax		3.54
			92.04

1. To compute extensions, multiply the quantity by the unit price, which will give you the total for each item: 5 X $3.50 = $21.00.

2. Add all amounts in the total column to get the total amount of the invoice.

3. Multiply the total amount by 4% South Carolina Sales Tax. This amount will be added to the total column to get the net amount of the invoice.

$88.50	total	$88.50	total
x .04		+ 3.54	sales tax
3.5400		$92.04	net amount

STUDENT ACTIVITY I (cont'd.)

I. Using the information given below, record it on an invoice as follows:

Current date
Customer's name and address: MARY LOU'S DRESS SHOP
136 Main Street
Florence, SC 29501

Invoice No. 42
Our Order No. 248
Customer Order No. 12
Shipped Via Southern Truck Line
Terms 2/10, N/30

2 boxes Paper Clips, size 100 @ $ .78 ea.
1 doz. Half cut file folders @ $1.85 doz.
1 ream Bond paper, 8½ x 11 @ $6.25 rm.
100 Bond Envelopes, med. size @ $ .03 ea.

II. Compute extensions. Total invoice. Compute 4% sales tax and add to sub-total.
Ask your instructor to evaluate your performance; then proceed to Check Out Activity I.

INVOICE

Sold To

Date

Our Order No.

Cust. Order No.

Terms

Shipped Via

Quantity	Description	Unit Price	Total

CHECK OUT ACTIVITY I

A. Using the blank invoices given you, record the following information.

1. Current date
   Customer's name and address: West Service Shop
   1453 South Main Street
   Peachtree, SC 23487

   Invoice No. 123
   Our Order No. 2
   Customer Order No. 35
   Shipped Via: Southern Coast Freight
   Terms 30 days

   18 pairs Golf Shoes @ $14.50 ea.
   20 pairs Golf Socks @ 1.25 ea.
   24 Golf Shirts @ 12.25 ea.
   Add 4% South Carolina Sales Tax

2. Current date
   Customer's name and address: Marlboro Junior High School
   Adams and Fourth Avenue
   Manatee, SC 23785

   Invoice No. 124
   Our Order No. 3
   Customer Order No. 189
   Shipped Via: Truck
   Terms 2/10, N/30

   5 doz. T shirts @ $10.25 doz.
   24 pairs sneakers @ 4.50 ea.
   2 doz. gym shorts @ 12.50 doz.
   Add 4% South Carolina Sales Tax

3. Current date
   Customer's name and address: Salem Sports Shop
   347 West Winston Street
   Mt. Arby, SC 25642

   Invoice No. 125
   Our Order No. 4
   Customer Order No. 487
   Shipped Via: Hennis Truck Lines
   Terms 1/10, N/30

   6 Tennis rackets @ $18.50 ea.
   6 doz. Tennis Balls @ 12.50 doz.
   2 doz. Racket protectors @ 24.50 doz.
   Add South Carolina Sales Tax 4%

B. Compute extensions, sub-total invoice, compute sales tax, and total the invoices.

INVOICE

SWANN'S ATHLETIC CO.

COLUMBIA, SC 29201

Telephone (803) 573-8085

Sold To

Date

Our Order No.

Cust. Order No.

Terms

Shipped Via

Quantity	Description	Unit Price	Total

INVOICE

SWANN'S ATHLETIC CO.

COLUMBIA, SC 29201

Telephone (803) 573-8085

Sold To

Date

Our Order No.

Cust. Order No.

Terms

Shipped Via

Quantity	Description	Unit Price	Total

COMPLETING INVOICES

INSTRUCTOR'S MANUAL

Prepared by

Jean Hamer

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INSTRUCTOR'S MANUAL
COMPLETING INVOICES

Review this module completely before beginning instruction. Then, duplicate the perishables listed below.

Perishables

1. Student Activity Sheet I
   One Invoice

2. Check Out Activity I
   Three Invoices

A blank invoice form is included in the student manual, page 5, for your use in duplicating the invoices required for the two learning activities.

Keys for both activities are included in this manual for you to use when evaluating your students' performance. Encourage your students to type the invoice forms, if possible. Also, if calculators are available, encourage their usage.

KEY

STUDENT ACTIVITY I

INVOICE 42

Sold To

MARY LOU'S DRESS SHOP
136 Main Street
Florence, SC 29501

Date (current)

Our Order No. 248

Cust. Order No. 12

Terms 2/10, N/30

Shipped Via Southern Truck Line

Quantity	Description	Unit Price	Total
2 boxes	Paper clips, Size 100	$ .78	$ 1.56
1 doz.	Half cut file folders, No. 12	1.85	1.85
1 ream	Bond paper, 8½" x 11", 20 lb.	6.25	6.25
100	Bond Envelopes, Size 9	.03 ea.	3.00
			12.66
	Add Sales Tax 4%		.51
			$13.17

Compute Sales Tax: $ 12.66
× .04
.5064 = $ .51 to be added to $12.66

KEY

CHECK OUT ACTIVITY I

INVOICE 123

SWANN'S ATHLETIC CO.

COLUMBIA, SC 29201

Telephone (803) 573-8085

Date (Current)

Our Order No. 2

Cust. Order No. 15

Sold To

West Service Shop
1453 South Main Street
Peachtree, SC 23487

Terms 30 days

Shipped Via Southern Coast Freight

Quantity	Description	Unit Price	Total
18 prs.	Golf Shoes	14.50 ea.	261.00
20 prs.	Golf Socks	1.25	25.00
24	Golf Shirts	12.25	294.00
	$580.00		580.00
	.04 Add 4% SC Sales Tax		23.20
	$ 23.2000		$603.20

INVOICE 124

SWANN'S ATHLETIC CO.

COLUMBIA, SC 29201

Telephone (803) 573-8085

Date (Current)

Our Order No. 3

Cust. Order No. 189

Sold To

Marlboro Junior High School
Adams & Fourth Avenue
Manatee, SC 23785

Terms 2/10, N/30

Shipped Via Truck

Quantity	Description	Unit Price	Total
5 doz.	T Shirts	10.25	51.25
24 prs.	Sneakers	4.50	108.00
2 doz.	Gym Shorts	12.50	25.00
	$184.25		184.25
	x .04		
	7.3700 Add 4% SC Sales Tax		7.37
			$191.62

KEY

CHECK OUT ACTIVITY I (cont'd.)

INVOICE 125

SWANN'S ATHLETIC CO.

COLUMBIA, SC 29201

Telephone (803) 573-8085

Sold To

Salem Sports Shop
347 West Winston Street
Mt. Arby, SC 25642

Date (Current)

Our Order No. 4

Cust. Order No. 487

Terms 1/10, N/30

Shipped Via Hennis Truck Lines

Quantity	Description	Unit Price	Total
6	Tennis Rackets	18.50	111.00
6 doz.	Tennis Balls	12.50 doz.	75.00
2 doz.	Racket Protectors	24.50	49.00
			235.00
	Add 4% SC Sales Tax		9.40
	$235.00 x .04 = $ 9.4000		$244.40